# Federal Program Officer Training Manual

# Competitive RFA Creation

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# Document Conventions

**Overview**  Welcome to the Grants Online Training Manual. This manual is set up to provide you with step-by-step information to accomplish tasks within Grants Online. The manual is logically sequenced based on the National Oceanic and Atmospheric Administration's (NOAA) Grants lifecycle process and is written to address your role within Grants Online.

**Using this Guide**  Use the following writing conventions as a guide in using the manual. The manual uses block label text in order to scan for the information desired.

**Text Conventions**

| Text; Example | What it means. |
|---|---|
| Text in Bold; Click **Done** | Indicates a command. |
| Text in Italics; *RFA Details* screen appears. | Indicates a screen. |
| Text in Bold Italics; ***Name*** | Indicates data to be entered into a field. |
| Text in All Caps; LOGIN | Indicates a field name. |

**Notes and Warnings**  Notes and Warnings are used to indicate information or advisories when using Grants Online.



**Note:**  A note is used to inform you about additional information during the procedure or process.



**Warning!**  Business process may not work as desired or a procedure may produce an undesirable effect.

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# Grants Online Overview

**Overview**     The National Oceanic and Atmospheric Administration (NOAA) offer a variety of competitive and non-competitive grants or awards to various communities including States, Universities, and non-profit organizations.  Prior to the advent of Grants Online, the processing of grants was a paper-based task involving time-consuming human interactions and program polices to process the grants and to ensure the awarding of the grant is given to the most qualified applicant for a competitive award, and for qualified designated applicants of non-competitive awards.

As part of its strategy to move scientifically and operationally into the 21$^{st}$ century, Grants Online was developed.  Grants Online is an E-Government initiative to create an automated tool that will support the grant evaluation, award, management and operations process.  Grants Online significantly streamlines and unifies grants processing throughout all of NOAA, allowing the agency to increase efficiencies related to mission goals.

Grants Online is developed to answer several issues that occur during the award processing including:

- Reducing or eliminating paper forms for application.
- Provide an interface with Grants.gov to ensure applicants can apply for grants electronically.
- Reduce the processing time by incorporating workflows between Federal Program Officers (FPO), Grants Management Division (GMD), Financial Assistance Legal Division (FALD), and Reviewers.
- Serve the NOAA community in its efforts to meet its mission goals more effectively.

## Grants Online Software Description

**About Grants Online**     Grants Online operates in a web environment.  As such, you will be required to use an internet browser to log in and use Grants Online. No software is required for installation.  As Grants Online is web-based, you may access the system anywhere at anytime provided that you have internet access.  Logins and passwords are required and will be relayed to you once you are established within the system.



**Note:**  You must have an Internet connection in order to access Grants Online.

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# Getting Started

**Overview**    When you are using any Windows-based software, navigation and ease of use are key components.  Grants Online incorporates an intuitive Graphic User Interface (GUI) that assists end users to navigate and use the system appropriately.  In Grants Online, all actions within the system can be made through mouse and keyboard.

**Overview**    Grants Online is accessible through your web browser, specifically Internet Explorer.

## *Accessing Grants Online*

**1.**    Click on the Internet Explorer Icon on your desktop

- Internet Explorer browser opens

**2.**    Enter the following URL information in your address bar of your browser:
https://grantsonline.rdc.noaa.gov then press **ENTER**

- *Grants Online Login* page appears

## *Logging in to Grants Online*

1.  If you haven't already, contact the Grants Online Help Desk to obtain your Username and Password.

    - Phone: 301-444-2112 or toll free at 1-877-662-2478.
    - Email: grantsonline.helpdesk@noaa.gov

2.  Enter your assigned *Username*

3.  Enter your assigned *Password*

4.  Click **Enter**



⚠️ Warning!    If you entered your username or password incorrectly you will see an error message in red on the screen. After three unsuccessful attempts to log in, the system will lock you out and you will have to contact the Grants Online Help Desk to unlock your account

If nothing happens when you click enter, it means the server is down and will need to be restarted.

## *Logging in to Grants Online*

**5.** The Notice to Users screen appears

**6.** Review disclaimer information and click **OK**
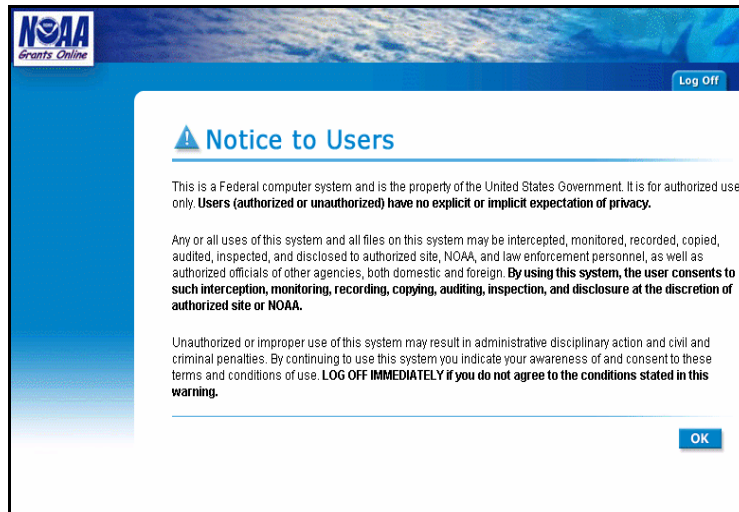
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# Creating a Competitive Request For Application

**Overview**     This manual will help you learn how to create and publish a Competitive Request For Application (RFA).

**Manual Objectives**     The Manual will address the following topics:

- Set up the RFA Header Information
- Create a Competition
- Select the Application Routing
- Set up the Minimum Requirements
- Create a Review Event
- Set up the Special Award Conditions
- Enter the Application Instructions
- Create a Review Event
- Publish the RFA
- Create the Federal Register Notice
- Create the Omnibus Synopsis

**What You'll Need to Create a Competitive RFA**

This RFA is the parent document that will guide both the applicant as well as the FPO. The applicant will use this information (which they will access via Grants.gov) to provide NOAA with a complete and quality proposal. The RFA also guides the Program Officer, Grants Specialist, Budget Officer, etc. in reviewing and examining the proposal. Creating the RFA is the first step that is taken by the Program Officer. In order to do so, you will need the following information:

1. RFA Name – the "name" is identified by the Program Officer. There is no right or wrong name, however, easily identifiable and shorter names are the most effective.
2. CFDA Number
3. Fiscal Year
4. Approximate funding amount for the RFA
5. Funding Amount for the Competition
6. Application due date
7. Review Event Start and End date
8. Contact person within NOAA who will be responsible for answering questions related to the RFA
9. Name of Program Officers who will process the proposals (these names will be identified during the Routing phase of the RFA creation)
10. Application Instructions – which forms the applicant must include in the proposal

### Creating a New Competitive RFA

1.  Select the RFA tab located at the top of the webpage
2.  Select the "Competitive" and "Create New from Scratch" options
3.  Click **Create RFA** button

**Building a New Competitive RFA**

Once you have successfully selected the option to Create a New Competitive RFA, you will need to start building the RFA by populating the mandatory fields (denoted by a *) with data.

*Building a Competitive RFA – Header Information*

1. RFA Name (required)
2. Fiscal Year (required)
3. Anticipated Publication Date (cannot be today's date or any date in the past)
4. Select an Assigned Program Office (required)
5. Select an Assigned Program Officer (required)
6. Select a CFDA Number (required)
   a. Only CFDA numbers associated with your line office will appear.  If you have a new CFDA number not in this list, contact the Help Desk
7. Select a Sub Program
8. Click the **Save** button

### *Creating a New Competitive RFA*

**Note**: Pages 10 and 11 represent creating a New RFA from an Existing one.  For creating an RFA  from Scratch, continue on page 12. The remaining steps will be the same for both actions.

1.  Select the RFA tab located at the top of the webpage
2.  Select the "Competitive" and "Create New from Existing" options

**Click** Create RFA **button**

**Building a New Ccompetitive RFA**

Once you have successfully selected the option to Create a New Competitive RFA, you will need to search for the existing RFA that you wish to build on.

*Building a Noncompetitive RFA – Search Information*

1. RFA Title
2. Funding Opportunity Number
3. CFDA Number
4. Fiscal Year (required)
5. Click **Search**
6. Click the **Select** Link beside the RFA ID

Note**: The RFA launch page only appears when doing "Create New from Existing". When doing "Create New from Scratch" you will be taken directly to the RFA details page. The remaining steps are the same for both Creating New RFA from Scratch and for Creating New RFA from Existing.**

**Building a New Competitive RFA – Additional Information**

You will now need to click on the **Go to RFA Details Page.**

### Additional Information

Upon successfully saving the RFA Header information, you will be prompted to enter additional information about the RFA.  This information includes funding amounts, due dates, contact information, and application routing.  The specifics for this process are demonstrated below:

### *Building a Competitive RFA– RFA Supplementary Information*

1. Anticipated Funding Amounts
2. Anticipated Award Amount (Min and Max)
3. Anticipated Number of Awards (Min and Max)

### *Building a Competitive RFA – (Selected Addresses)*

1. Click **Add/Edit** to identify an address. This is the location all paper based proposals will be sent (Please note: the picture below represents a lower portion of the Grants Online screen – you may have to scroll down to see it)
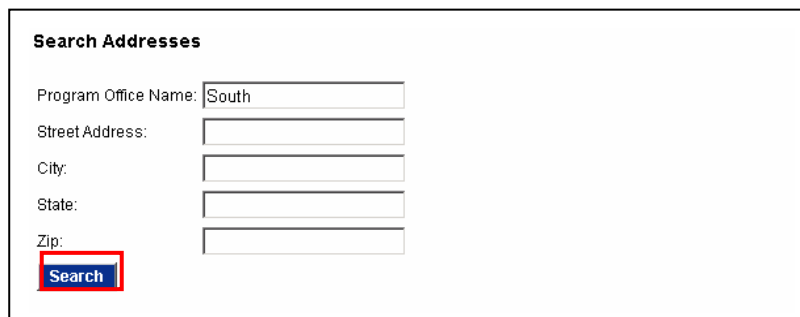
> **Selected Addresses:**
> No addresses have been selected.
> Add/Edit
>
> **Selected Contacts:**
> No contacts have been selected.
> Add/Edit
>
> **Recipient Information/Application Details**
> No recipients have been selected.
> Add New

2. Type in search Query (usually Program Office Name)
3. Click **Search**

> **Search Addresses**
>
> Program Office Name: South
> Street Address:
> City:
> State:
> Zip:
> **Search**

> **Note**: If you enter search criteria into more than one field, you are asking the system to search and match all the information you entered. We recommend you enter the organization's name you are looking for and search – rather than entering the organization's name and address, etc.

***Building a Competitive RFA –*** *(Selected Addresses)*

4. Select the address you wish to choose by clicking in the check box next to your selection (see picture below)
5. Click **Add to RFA**

**Building a Competitive RFA -** *(Selected Addresses)*

6.  If you need to add another address, complete steps 2-5 again. If you made a mistake, and want to remove this address, click the check box by the organization's name and select **Remove from RFA**. You will then need to complete steps 2-5 to select a new address.

7.  Once you are satisfied with your selected address(es), click **Save and Return to Main**

**Search Addresses**

Program Office Name: [                    ]

Street Address: [                    ]

City: [                    ]

State: [                    ]

Zip: [                    ]

[ **Search** ]

**Search Results**

Nothing found to display.

[ **Add to RFA** ]

**Selected Addresses for this RFA**

One item found.**1**

| ☐ Program Office Name | Address |
|---|---|
| ☐ SOUTH EAST REGIONAL OFFICE - NMFS | 1315 East-West Highway, Silver Spring, MD 20910 USA |

[ **Remove from RFA** ]

[ **Save and Return to Main** ]

Selected Contacts

A minimum of one search criteria must be entered when searching for contacts.  You will be able to search by First Name, Last Name, Org Name, Street, City, State, Zip, Phone or Email.

**Building a Competitive RFA-** *(Selected Contacts)*

1.      Click on the **Add/Edit** button under *Selected Contacts.*  This is the person the applicant will contact with any questions about this funding opportunity.

**Competitive RFA Details**

**RFA Header Information**

| | | | |
|---|---|---|---|
| Document ID | 103784 | Announcement Type | |
| Line Office * | NATIONAL MARINE FISHERIES SERVICE | Funding Opportunity Number | NMFS-SERO-2005-100312 |

RFA Name *     Competitive FPO Manual

Fiscal Year *     2005          Anticipated Publication Date *     05/10/2005

Assigned Program Office *     SOUTH EAST REGIONAL OFFICE - NMFS     Assigned Program Officer *     Peterson, Charles

CFDA Number *     11.433 - MARINE FISHERIES INITIATIVE

Sub Program     SE Competitive

**RFA Supplementary Information**

Anticipated Funding Amount $     1000000          Actual Funding Amount $

| | Min | Max |
|---|---|---|
| Anticipated Award Amount $ | 250000 | 500000 |
| Anticipated Number of Awards | 1 | 4 |

**Selected Addresses:**

| Street Address | City, State, Zip |
|---|---|
| 1315 East-West Highway | Silver Spring, MD 20910 |

Add/Edit

**Selected Contacts:**

No contacts have been selected.

Add/Edit

***Building a Competitive RFA-*** *(Selected Contacts)*

2. Enter the search information for the individual you would like to identify and click **Search**

**Building a Competitive RFA-** *(Selected Contacts)*

3.      Select the address you wish to choose by clicking in the check box next to your selection (see picture below)

4.      Click **Add to RFA**

**Search Contacts**

First Name: charles
Last Name: alexander
Org Name:
Street:
City:
State: Please select a state
Zip:
Phone:
Email:

[ Search ]

**Search Results**

One item found. **1**

| ☐ Contact Name | Org Name | Address | Phone | Email |
|---|---|---|---|---|
| ☑ Charles E. Alexander | National Ocean Service (NOS) | 1305 EAST WEST HWY Silver Spring, MD 20910-3281 | 301-713-3125 | test@aa.com |

[ Add to RFA ]

**Building a Competitive RFA-** *(Selected Contacts)*

5.    If you need to add another contact, complete steps 2-4 again. If you made a mistake, and want to remove this individual, click the check box by the person's name and select **Remove from RFA**.  You will then need to complete steps 2-4 to select a new address.

6.    Once you are satisfied with your selected contact(s), click **Save and Return to Main**

## *Building a Competitive RFA - (Program Elements/Funding Priorities)*

1. Select **Add/Edit**

2. Input the Program Element/Fund Priority Name
3. Input a Description
4. Click **Save**

**Building a Competitive RFA -** *(Program Elements/Funding Priorities)*

**5. Select** Add **if you wish to add another Program Element/Fund Priority**
**6. Click** Done

## Competitions

Every competitive RFA in Grants Online needs to have a competition. The competition is the meat and bones of a competitive RFA in that it is the place where the FPO defines due dates, funding amounts, routing, recipient types, review events (a necessity), minimum requirements, etc. You many have multiple competitions under one RFA, as each competition results in a selection package. However, please note that each competition also needs a Review Event. Review Events are discussed at a later point in this manual.

*Building a Competitive RFA-* *(Creating a Competition)*

1. Click **Save** to capture the changes we've made so far
2. Click **Add New** under the Competitions header to create a new competition

**Competitive RFA Details**

**RFA Header Information**

| | | | |
|---|---|---|---|
| Document ID | 103784 | Announcement Type | |
| Line Office * | NATIONAL MARINE FISHERIES SERVICE | Funding Opportunity Number | NMFS-SERO-2005-100312 |

RFA Name *  Competitive FPO Manual

| | | | |
|---|---|---|---|
| Fiscal Year * | 2005 | Anticipated Publication Date * | 05/10/2005 |
| Assigned Program Office * | SOUTH EAST REGIONAL OFFICE - NMFS ▼ | Assigned Program Officer * | Peterson, Charles ▼ |

CFDA Number *  11.433 - MARINE FISHERIES INITIATIVE

Sub Program  SE Competitive ▼

**RFA Supplementary Information**

Anticipated Funding Amount $ 1000000   Actual Funding Amount $ 

|  | Min | Max |
|---|---|---|
| Anticipated Award Amount $ | 250000 | 500000 |
| Anticipated Number of Awards | 1 | 4 |

**Selected Addresses:**

| Street Address | City, State, Zip |
|---|---|
| 1315 East-West Highway | Silver Spring, MD 20910 |

Add/Edit

**Selected Contacts:**

| Contact Name | Phone | Address | Email |
|---|---|---|---|
| Mr. Charles Marcus Peterson | 301-713-0105 | 1315 East-West Highway, Silver Spring, MD 20910 | charles.peterson@noaa.gov |

Add/Edit

**Program Elements/Funding Priorities:**

No Program Elements/Funding Priorities Available

Add/Edit

**Competitions:**

**Press Save before selecting the following link(s)**

No Competition

Add New

[ Save ]  [ Create Publication(s) ]  [ Save & Continue ]  [ Cancel ]

**Building a Competitive RFA-** *(Creating a Competition)*

3. Enter Competition Name (automatically defaults to be the same name as the RFA)
4. Enter Fiscal Year
5. Select Competition Type
6. Select Competition Manager (this is the person who will work on the Selection Package, Confirm Review Events, etc.)
7. Click **Save**

***Building a Competitive RFA-*** *(Creating a Competition)*

8.    Select Selecting Official

9.    Select applicable Recipient Types (those recipients who are eligible to compete for funding)

10.    Enter the Anticipated Federal Funding for this competition (Min and Max)

11.    Enter the Application due date

12.    Enter the Application due time

13.    Enter the Anticipated Award Date

**Application Routing**

Selecting the application routing is required when creating any RFA. This will determine who will process the proposal/application. You have the ability to identify routing by workload, state or Priority/Program Element. Upon selecting a routing method, the other methods will be "disabled". If a routing method has been selected in error, the user must clear all selections made and save the changes.

> ⚠️ **Warning!**    If you neglect to configure routing, the applications will NOT be sent to an FPO for processing. This is a necessary action!

*Building a Competitive RFA- (Application Routing)*

1.    Select either Workload or State routing

    a.    <u>Workload</u>: This routing method means you select different individuals who will receive applications throughout workflow. Each application will be distributed on a round robin basis depending on the individuals you designate in the workload routing.

    b.    <u>State routing:</u>  This routing method allows for you to create groups by states. You can identify a single state, or a group of states you would like in a group, and then you can identify the Program Officers that would look at the applications from that particular group of states.

2.    Once you have chosen a routing type (Workload or State), select **Configure Routing**

**Application Routing**

    ○ Workload    ○ State                    | **Configure Routing** |
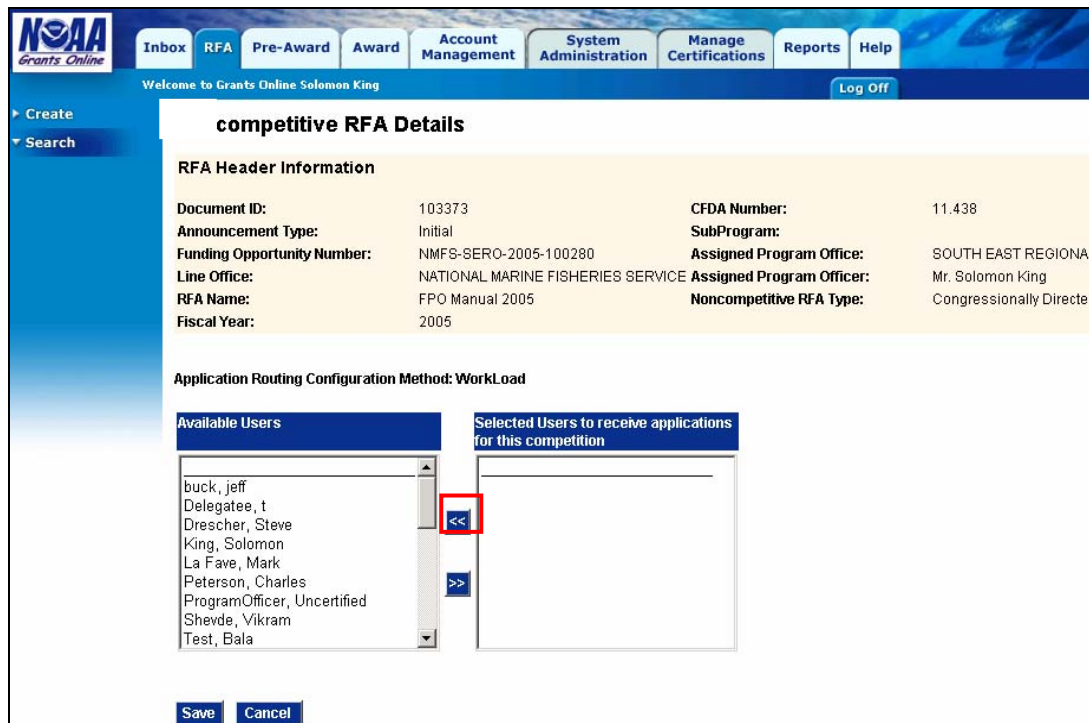
> 💡 **Note**:    Workload is the option selected in most cases. Whoever is identified as the selected user in routing will be the person who receives the task to perform the Minimum Requirements on the submitted application. The Federal Program Officer (FPO) who receives this task has the ability to reassign the task to another FPO.

> ⚠️ Warning:  **Whoever completes the task to perform minimum requirements on the application is the individual who will "own" that application. That FPO will also receive tasks to perform and work on the following actions:**
>
> **Conduct Negotiations, PO Checklist, Procurement Request and Commitment of Funds (CD 435) and NEPA Document.**

**Building a Competitive RFA-** *(Application Routing)*

3.  Click on the name of the person(s) you would like to receive applications (to select more than one, hold down the Ctrl key and use the mouse to highlight) and then click on the >> button. The selected individuals will now display in the *Selected Users to receive applictions for this competition* field. Remember, if you identify more than one individual, the applications will be routed in a round robin format.



> **Note**:   If a user has been selected in error, highlight the name and click the top double arrows to push the user back to the Available User box.

4.  Once you have selected the appropriate person(s), click **Save**
    a.  Click **Cancel** to go back to the previous page (without capturing your changes)

### Building a Competitive RFA- *(Application Routing)*

You will now be taken back to the competition detail screen.  As you can see, State Routing and Program Element are both listed as disabled.  This is because you can only have one routing method per RFA.

4.   At this point in time, click the **Save** button at the bottom of the page.  We have now entered ALL the mandatory information, so your work will now save.
   a.   **Cancel** will take you out of this page without capturing the changes you made
   b.   **Save and Continue** will initiate workflow – do not click this button until you have completed the RFA

***Building a New Competitive RFA -*** *(Changing Application Routing)*

If you have determined that you selected the wrong routing type, and wish to change it, perform the following steps: *(If you would like to continue creating your RFA, skip to page 37)*

1.     Click on **Configure Routing**

**Building a New Competitive RFA -** *(Changing Application Routing)*

2. Highlight the names of the individuals that had previously been selected and click the ◄◄ button
3. Click **Save**

**Building a Competitive RFA-** *(Changing Application Routing)*

4.      You will be taken back to the C*ompetitive RFA Details* screen. (Note that none of the routing buttons are listed as disabled)

5.      Select the radial button next to State

6.      Click **Configure Routing**

***Building a Competitive RFA-*** *(Changing Application Routing)*

7.      Click **Add New**

**Application Routing Configuration Method: State**
No state routing groups have been created

Add New

Cancel

Save and Return to Main

***Building a Competitive RFA-*** *(Changing Application Routing)*

8.  Provide a name for your routing group (you can have multiple groups)
9.  Highlight the states you would like to include in your routing group, and use the ⏩ button to select them
10. Highlight the users who will work on applications from the states in this group and use the ⏩ button to select them

    a.  Proposals/applications from the states in this routing group will go to the Federal Program Officer selected so that the FPO can perform the Minimum Requirements check on the submitted application. Each application will be distributed on a round robin basis amongst the selected users you chose in this routing group.

11. Click the **Save** button



**Warning!**   If an application comes in from a state that you did not select in any of your routing groups, then it will NOT be routed through in workflow.
Example: if an application comes in from PA, but PA was never selected as a state in any of the routing groups, then the application will not be routed to anyone.

**Building a Competitive RFA-** *(Changing Application Routing)*

12.     You how have one routing group identified.  Select Edit or Delete if you would like to make changes to this group

13.     Click on **Add New** to identify another routing group



14.     When creating a new group, note that states already selected appear as seen below in the red box – this is to let you know not to select that state again.

15.     Follow steps 8-11 to create another routing group.

**Building a Competitive RFA-** *(Changing Application Routing)*

16. Once you have created all the groups you need, click **Save and Return to Main**

## *Building a Competitive RFA-* *(Minimum Requirements)*

We now want to work on the hyperlinks displayed below the routing section: Minimum Requirements, Application Instructions, Special Award Conditions and Review Events.

1.      Before you click on any of the hyperlinks in the, click the **Save** button
2.      Click on the **Minimum Requirements** link

***Building a New Competitive RFA- Other*** *(Minimum Requirements)*

A standard set of minimum requirements is automatically populated in this screen.

1.   To view or edit a requirement, select **Edit**
2.   To delete a requirement, click **Delete**

## Selected Minimum Requirements

| Priority | Requirement Name | Actions |
|---|---|---|
| 1 | Eligible Applicant | Edit Delete |
| 2 | Application Received by Deadline | Edit Delete |
| 3 | Application Meets Minimum Federal Funding | Edit Delete |
| 4 | Application Meets Maximum Federal Funding | Edit Delete |
| 5 | Application Meets Minimum Match | Edit Delete |
| 6 | Application Meets Maximum Match | Edit Delete |
| 7 | Complete Application | Edit Delete |

Reorder

Add >>

<< Done

**Note**:   As an FPO, you are identifying the requirements that the applicant must meet in order to be considered for an award under this RFA.  The purpose of this section is for you to denote the items you want verified when an application is submitted. This allows for evaluation consistency across all applicants under this RFA.

### Building a Competitive RFA- *(Minimum Requirements)*

3.      To add a new requirement click **Add>>**  (as seen on the previous page)
4.      Enter the requirement name
5.      Enter the description of the requirement
6.      Click **Save**
7.      Click **Cancel** to go back to the previous page (any changes made on the page will not be saved)

**Add Minimum Requirement**

Name: *

Name of New Requirement

**Spell Check**

Enter specifics here

Description:*

Save   Cancel

**Building a Competitive RFA-** *(Minimum Requirements)*

8.     The system will take you back to the Minimum Requirements page, where you can add a new requirement, reorder existing requirements, or select **<<Done** to continue working on the RFA



9.     Once you click **<<Done**, the system will bring you back to the C*ompetition Details* screen.

## Application Package

This section allows for you to identify what types of forms the applicant needs to submit as part of their application package. The forms that are listed under the *Available Forms* section represent the OMB approved Pure Edge Viewer forms. If you require an additional form that is not listed, you may add that form to the instructions (see steps 4-6 below).

### *Building a Competitive RFA- (Application Package)*

1. Scroll down to the bottom of the screen and click on the **Application Package** link

***Building a Competitive RFA-*** *(Application Package)*

1. From the first drop down menu, select a Form Family
2. From the second drop down menu, select a Template
3. Click **Save**



4. If you wish to specify another document you want the applicant to submit (that is not listed under Available Forms), click the **Attachments** link
5. **Browse** for the file you wish to attach, and enter a brief *description*
6. Click **Save Attachment**

**Building a Competitive RFA-** *(Application Package)*

7.      Once you are satisfied with the Application Package section, and the selected forms/documents, click **Save**



8.      Once you click **Save,** you must click **Cancel** to return to the C*ompetitive RFA Details* screen.

**Note:**   1.  Nearly all NOAA opportunities have a standard application package consisting of: 424, 424a, 424b and CD511

2.  CD346 and SFLLL are optional forms, however certain applicants will have to complete those forms and add them to the proposal package

3.  The CD346 is not available in Grants.gov, so you as a program officer must inform applicants to get that form from DOC forms library and attach a completed version to their proposal package.

4.  For construction package the 424c and 424d would be used in lieu of 424a and 424b

5.  A standard application package includes project narrative and budget narrative files – these are not forms, they are whatever the applicant wishes to upload

6.  Steve Drescher uses one of the standard application package formats when uploading to Grants.gov, therefore, if you have something specific needed, make sure you let him know via email.

**Special Award Conditions**

This section allows you to identify any Special Award Conditions (SAC) that will be applied to every recipient under this RFA.  This is not a required field and should be used if only you need to identify a SAC that will apply to all recipients under this RFA

*Building a Competitive RFA- (Special Award Conditions)*

1.  To specify or view Special Award Conditions, click on the **Special Award Conditions** link *(If your RFA does not require any Special Award Conditions, skip to page 64)*

**Building a Competitive RFA-** *(Special Award Conditions)*

1.    Click on the **Create From Scratch** link

**Special Award Conditions**

Create From Scratch

**Available Special Award Conditions**
No available Special Award Conditions found.

**Save and Return**    **Cancel**

**Building a Competitive RFA-** *(Special Award Conditions)*

2.  Enter the Name (required)
3.  Enter the Description (required)
4.  Click **Save** to capture the changes and stay on this screen OR click **Done** to capture the changes and go back to the previous screen
    a.  Click **Cancel** to leave the screen without making any changes

**Building a Competitive RFA-** *(Special Award Conditions)*

5. There is now a Special Award Condition established for this RFA. If you would like to edit the SAC, click **Edit**. If you want to delete it, click **Delete**.

6. You can select **Create From Scratch** to identify another SAC, or select **Save and Return** to continue creating your RFA

## Review Event

Although Review Events currently occur outside the Grants Online system, you are still required to create a Review Event during the competitive RFA building process. The following pages detail a workaround that allows for you to skip many of the steps associated with performing a "dummy" review in Grants Online.

### *Building a Competitive RFA- (Review Event)*

1.    Click on the **Review Events** link

**Building a Competitive RFA-** *(Review Event)*

2.  Click on **Add New>>**



3.  Enter Review Event Name
4.  Select Review Basis
    a.  As long as we are conducting reviews outside the system, you should select Independent Individual Merit – regardless of the type of review you are actually performing
5.  Click **Save**

6.    Enter Anticipated Review Start Date (cannot be before application due date)

7.    Enter Anticipated Review End Date

> Note:    You can set the Review Event Start and End dates to meet your needs, however in order for the workaround to function properly the Review Event CANNOT be set to begin in the past.

**Review Event Information**

| | |
|---|---|
| Review Event Name:* | FPO Competitive Manual |
| Review Basis: * | Independent Review     Primary Scoring Method: *    No configured methods ▼ |
| Summary Score Determination: * | Mean ▼     Cutoff Score: |
| Anticipated Review Start Date:* | 05/12/2005     Anticipated Review End Date:* 05/15/2005 |

8.    Select a scoring method, Quantitative or Qualitative (we recommend Quantitative for the purpose of the review event workaround)

9.    Quantitative Scoring:

   a.    Percentage or Points

      i.    If you select Points, be sure to enter the total number of points in the Total Points box

10.    Click the **Define Criteria** button to provide more detail about the scoring method

**Quantitative Scoring**

Quantitative Scoring Type: *
○ Percentage
◉ Points    Total Points: 10
○ Neither

**Define Criteria**

**Qualitative Scoring:**

No qualitative scoring methods have been defined.
Add New >>

***Building a Competitive RFA-*** *(Review Event)*

11.    Click **Add New>>** to define the point scoring criteria

**Criteria for Quantitative Scoring - Points**

No criteria have been defined.

Designated Total Points: 10.0

Add New >>

<< Cancel   << Done

12.    Define first criteria
13.    Provide Name
14.    Enter Minimum Score
15.    Enter Maximum Score
16.    Enter a Description
17.    Click **Save** to capture changes and continue on OR click **Cancel** to go back without saving your changes

**Criteria for Quantitative Scoring - Points**

Name: *         Criteria 1

Minimum Score: *   1

Maximum Score: *   10

Spell Check

Description: *    Enter description of criteria here

34 / 4000    Spell Check

Save    Cancel

18. If you need to add more criteria click **Add New>>**
19. If you need to edit or delete the criteria click **Edit** or **Delete**
20. You may also reorder the priority of the criteria by clicking **Reorder>>**
21. Once you are finished entering the criteria for the Review Event, click **<<Done** (This will take you back to the Review Event details page)
22. If you would like to go back to the Review Event details page, click **<<Cancel**

**Criteria for Quantitative Scoring - Points**

| Priority Order | Name | Minimum Score | Maximum Score | Edit | Delete |
|---|---|---|---|---|---|
| 1 | Criteria 1 | 1 | 10 | Edit | Delete |

Sum of Maximum Scores: 10.0
Designated Total Points: 10.0

Add New >>
Reorder >>

<< Cancel   << Done

## ***Building a Competitive RFA-*** *(Review Event)*

23.    Enter the Reviewer Instructions in the text box provided

24.    Click **Save** to capture the changes and stay on this screen

25.    Click **Save & Continue** to continue working on the RFA

> Note:   If you receive a red error message at the top of the screen be sure to make the necessary changes and click SAVE before moving on, otherwise your edits will not be captured

**Review Event Information**

| | | | |
|---|---|---|---|
| Review Event Name:* | FPO Competitive Manual | | |
| Review Basis: * | Independent Review | Primary Scoring Method: * | Quantitative -- Points |
| Summary Score Determination: * | Mean | Cutoff Score: | |
| Anticipated Review Start Date:* | 05/12/2005 | Anticipated Review End Date:* | 05/15/2005 |

**Quantitative Scoring**

Quantitative Scoring Type: *
-- Percentage *(Disabled)*
⊙ Points   Total Points: 10
-- Neither *(Disabled)*

[ Define Criteria ]

**Qualitative Scoring:**

No qualitative scoring methods have been defined.
Add New >>

**Reviewer Instructions**

```
Enter instructions that you would normally send to the reviewers here - FALD will review these at a
later date
```

[ Spell Check ]

[ Save ]    [ Save & Continue ]    [ Cancel ]

***Building a Competitive RFA***

26.    Independent Review page displays Navigate to Associated Documents and click on the link next to RFA

**Building a Competitive RFA-** *(FFO and Omnibus Synopsis)*

**FFO and Omnibus Synopsis**

Each competitive RFA requires the creation of an FFO and an Omnibus.  Those documents will be published on Grants.gov and will provide the applicants with the instructions for applying to this RFA.  You will want to make sure your information is as accurate as possible, as FALD will be reviewing these documents before they are published on Grants.gov

1.  The *RFA Header* page now displays
2.  Click on the **Go to RFA Details Page>>** link

___

**Building a Competitive RFA-** *(FFO and Omnibus Synopsis)*

___

3.     Click on the **Create Publication(s)** button to start working on the FFO and Omnibus Synopsis

**Competitive RFA Details**

**RFA Header Information**

| | | | |
|---|---|---|---|
| Document ID | 103784 | Announcement Type | Initial |
| Line Office * | NATIONAL MARINE FISHERIES SERVICE | Funding Opportunity Number | NMFS-SERO-2005-100312 |

RFA Name * : Competitive FPO Manual

Fiscal Year * : 2005     Anticipated Publication Date * : 05/10/2005

Assigned Program Office * : SOUTH EAST REGIONAL OFFICE - NMFS     Assigned Program Officer * : Peterson, Charles

CFDA Number * : 11.433 - MARINE FISHERIES INITIATIVE

Sub Program : SE Competitive

**RFA Supplementary Information**

Anticipated Funding Amount $ : 1,000,000.00     Actual Funding Amount $ :

|  | Min | Max |
|---|---|---|
| Anticipated Award Amount $ | 250,000.00 | 500,000.00 |
| Anticipated Number of Awards | 1 | 4 |

**Selected Addresses:**

| Street Address | City, State, Zip |
|---|---|
| 1315 East-West Highway | Silver Spring, MD 20910 |

Add/Edit

**Selected Contacts:**

| Contact Name | Phone | Address | Email |
|---|---|---|---|
| Mr. Charles Marcus Peterson | 301-713-0105 | 1315 East-West Highway, Silver Spring, MD 20910 | charles.peterson@noaa.gov |

Add/Edit

**Program Elements/Funding Priorities:**

No Program Elements/Funding Priorities Available

Add/Edit

**Competitions:**

Press Save before selecting the following link(s)

| Competition Name | Actions |
|---|---|
| Competitive FPO Manual | Edit  Delete |

Add New

Save     **Create Publication(s)**     Save & Continue     Cancel

**Building a Competitive RFA-** *(FFO and Omnibus Synopsis)*



4.   Create Publications screen appears
5.   Click on each of the mandatory hyperlinks to enter information.

Note:    FALD will not clear the document unless each category is addressed.

**Publication Text**

6.      When you click on the link, a text box opens  ⟶

Dates

7.      Data is pulled in from your RFA – check data for accuracy

Anticipated Publication Date: 5/11/2005

8.      Enter additional data if necessary

Competition: Competitive FPO Manual
Anticipated Award Date: 11/19/2005
Application Due Date: 5/13/2005

9.      Click **Save**

Note:    Each text box must have some text in it before you can successfully save.  If you do not wish to add anything, type N/A

10.    Repeat steps 6-9 for all twenty-three mandatory fields

11.    Once you have entered all the information, click the **Save and Return to Main** button at the bottom of the *Create Publications* page

| Save | Spell Check | Cancel |

***Building a Competitive RFA-*** *(FFO and Omnibus Synopsis)*

12.    New buttons now display at the bottom of the screen

**Save**     - This button allows you to capture changes made on this screen

**View Report**

                      - This button will open a word document, whereby you are able to view all of the information provided in the links below.  You do NOT want to make changes to the word document, as they will not be captured.  Be sure to make changes under the specific link, shown in the picture below. This button will also initiate workflow.

**Cancel**    - This button will take you out of this page and back to the FFO header screen

13.    Once you are confident the FFO is ready for review, click the **FFO Routing Slip and Start Workflow** button

**Warning!**     Once you click FFO Routing Slip and Start Workflow, workflow is  sstinit initiated and a task is sent to your inbox

| Save | FFO Routing Slip and Start Workflow |
| --- | --- |
| **View Report** | **Cancel** |
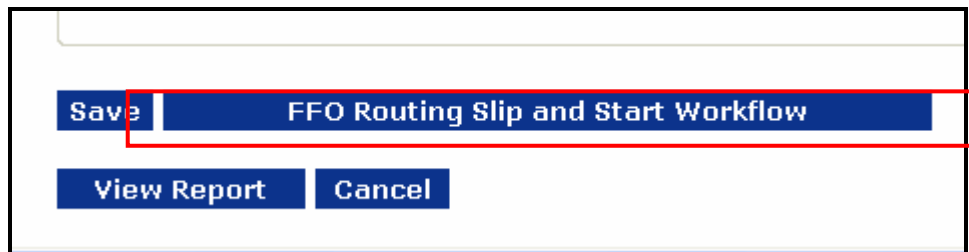
Note: The RFA Publisher recommends that the user not start the FFO workflow at this time, but first create the Synopsis and start its workflow, then return to the FFO to start its workflow.  This is because there are stricter time constraints on the Synopsis to have it ready for publication.

***Building a Competitive RFA-*** *(FFO and Omnibus Synopsis)*

14. The Routing Slip page now appears – Here you have the ability to add an Optional Reviewer or RFA Publisher

15. Select **Find User**

**Building a Competitive RFA-** *(FFO and Omnibus Synopsis)*

16. Input the name of the person you wish to add
17. Select **Search**
18. To choose the person you wish to add press the **Select** link



19. Now select **Add User**
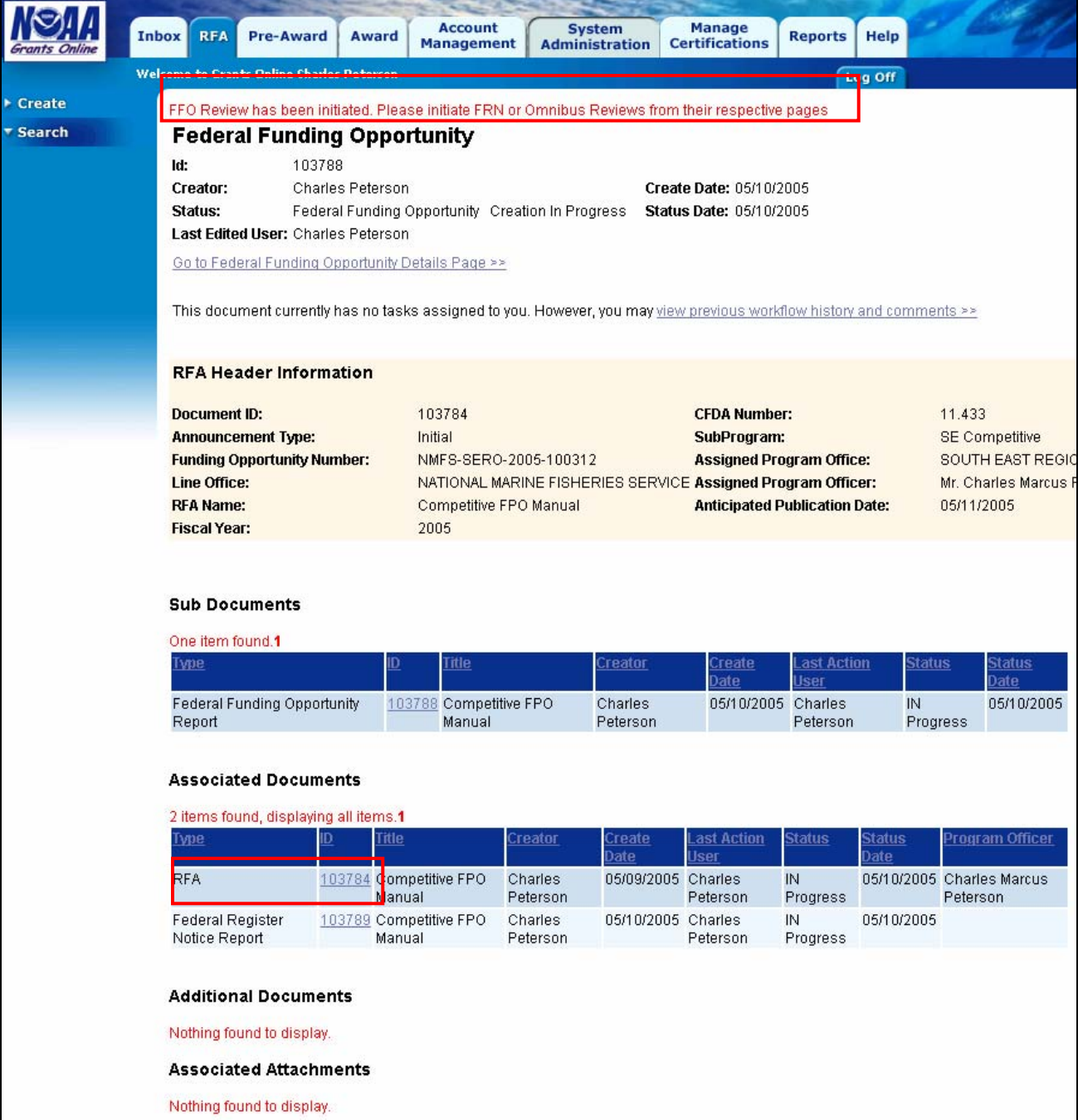20. Click **Save Route**
21. Click **Start Workflow**.



22. The Federal Funding Opportunity header page appears

**Building a Competitive RFA-** *(FFO and Omnibus Synopsis)*

     a.   Notice the message informing you that the FFO review has been initiated

    23. Navigate down to the Associated Documents and click on the **RFA** link

**Building a Competitive RFA-** *(FFO and Omnibus Synopsis)*

24. Note that under Sub Documents, there are now 4 documents found.  Navigate to the second screen under Sub Documents to find the Omnibus Synopsis
25. Click on the link by the Omnibus Synopsis

## Competitive RFA Details

### RFA Header Information

| | | | |
|---|---|---|---|
| **Document ID:** | 2014975 | **CFDA Number:** | 11.417 |
| **Announcement Type:** | Initial | **SubProgram:** | None |
| **Funding Opportunity Number:** | OAR-SG-2007-2000354 | **Assigned Program Office:** | OAR National Sea Gra Program (SG) |
| **Line Office:** | Oceanic and Atmospheric Research (OAR) | **Assigned Program Officer:** | Dr. Nikola Marie Garbe |
| **RFA Name:** | Knauss 2007 | **Anticipated Publication Date:** | 06/30/2005 |
| **Fiscal Year:** | 2007 | | |

## Sub Documents

5 items found, displaying all items.**1**

| Type | ID | Title | Creator | Create Date | Last Action User | Status | Status Date |
|---|---|---|---|---|---|---|---|
| Applications Report | 2014975 | Applications Report | | | | | |
| Competition | 2014976 | Knauss 2007 | Nikola Garber | 06/27/2005 | System Account | | 04/03/2006 |
| Review Event | 2014977 | Knauss | Nikola Garber | 06/27/2005 | Nikola Garber | RFAReviseActions – Not Started | 07/07/2005 |
| Federal Funding Opportunity | 2014978 | Knauss 2007 | Nikola Garber | 06/27/2005 | System Account | | 11/20/2006 |
| Omnibus Synopsis | 2014979 | Knauss 2007 | Nikola Garber | 06/27/2005 | System Account | | 11/20/2006 |

**Building a Competitive RFA-** *(FFO and Omnibus Synopsis)*

26. The *Omnibus Synopsis* details page appears
27. Click on the **Go to Omnibus Synopsis Details Page>>** link

**Building a Competitive RFA-** *(FFO and Omnibus Synopsis)*

28. Omnibus Synopsis screen appears
29. Follow the same process (steps 6-9) that you went through for the FFO
30. Click Save to Capture your changes
31. Click FFO Routing Slip and Start Workflow to initiate review of the FRN

⚠️ **Warning!**  Once you click FFO Routing Slip and Start Workflow, workflow is initiate initiated and a task is sent to your inbox

## Omnibus Synopsis

Please click on this icon to view the audit trail on this Omnibus: 📇

Please read the appropriate guidance documents before filling out the fields below.

Regulatory Information Number (RIN)  `0000`

FFO Number  OAR-SG-2007-2000354

**Synopsis**

Funding Opportunity Title `Knauss 2007`

   I.   Summary Description
  II.   Funding Availability
 III.   Statutory Authority
 IV.   Catalog of Federal Domestic Assistance (CFDA) Number 11.417, Sea Grant Support

  V.   Application Deadline
 VI.   Address for Submitting Proposals
VII.   Information Contacts
VIII.   Eligibility
 IX.   Cost Sharing Requirements
  X.   Intergovernmental Review

[ Save ]  [ FFO Routing Slip and Start Workflow ]

[ View Report ]  [ Cancel ]

**Building a Competitive RFA-** *(Publishing the RFA)*

1. Click on your inbox tab and go to your tasks
2. You have two tasks to Review – one for the Omnibus Synopsis and one for the FFO



3. Click **View** by the task you wish to act on
4. The Task Screen appears
5. There are three options in the action dropdown
   a. Approve – approves the document and will send to FALD for review
   b. Return for Revisions –Allows the user to return the FFO or Synopsis to the RFA Creator. This step is for an Optional Reviewer who is NOT the same as the RFA Creator.
   c. View Details – allows you to view the specifics on the FFO/Omnibus. This step also allows the user to make changes before moving the document forward in the workflow.
6. Select an action (select approve if you are ready to forward to FALD for review) and click **Submit**



Once FALD approves the FFO and Synopsis, The RFA Publisher will receive tasks to review, approve, and publish/post these documents. The FFO will be posted to Grants.gov. Before the Synopsis is published, it will be linked to an Omnibus FRN which will then be sent for publication. Once published, the RFA Publisher will enter the actual publication date into the Grants Online RFA details screen.

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